



Town of Moraga	Agenda Item
CONSENT	6.3

Meeting Date: April 11, 2018

TOWN OF MORAGA

STAFF REPORT

To: Honorable Mayor and Councilmembers
From: Cynthia Battenberg, Town Manager
Subject: Review and Accept Report on Results of Town of Moraga March 2018 Staffing Assessment Report Performed by Management Partners

Request

Review and accept report on results of the staffing assessment report performed by Management Partners.

Background

In light of the fiscal challenges currently facing the Town and in response to concerns raised from the community regarding the Town's staffing levels, Jim Holgersson, Interim Town Manager, retained the services of Management Partners to perform an assessment of the Town's staffing levels, capacity and service delivery.

Management Partners compared the Town's staffing levels in Administrative Services, Public Works, Parks and Recreation, and Planning to the levels of peers. The similar agencies selected included the Cities of Half Moon Bay, Hercules, Lafayette, Orinda and San Anselmo. These five bay area cities have populations between 12,000 and 26,000; median household incomes between \$100,000 and \$200,000; and do not provide fire services. Data from the cities of Danville and Walnut Creek was also collected, but not included in the calculations of peer averages.

Discussion

The study contains detailed comparative information regarding populations, median household income, operating budget per full-time equivalent employee (FTE), and number of FTEs per department. The study found that Moraga has the second highest ratio of median household income per FTE and the lowest ratio of operating budget per FTE and concluded that Moraga is operating with a smaller staff and is likely providing fewer services than peers.

1 An analysis of FTEs per department revealed that Moraga has about half the
2 administrative services and public works staff as the peer average and close to the
3 average number of FTEs in planning and park maintenance. The parks and recreation
4 staffing was found to be the same as the other peer cities with the exception of
5 Hercules. The study contains additional detailed information about the staffing levels by
6 department.

7
8 Management Partners noted important strengths and organizational values, namely the
9 quality of existing employees who understand the importance of public service and try to
10 service the community as best they can with limited resources. The study also includes
11 the eight (8) recommendations listed below:

- 12 1. Fill vacancies with temporary staff or contractors until permanent staff is hired.
- 13 2. Create a maintenance service baseline for custodial, park landscaping, and
14 facility maintenance.
- 15 3. Develop a system to categorize and prioritize all maintenance work as either
16 preventative, proactive, reactive, or discretionary.
- 17 4. Inspect all facilities to identify current maintenance needs and schedule major
18 work needed in the future.
- 19 5. Develop a strategic plan to transition manual recordkeeping to modern business
20 systems.
- 21 6. Develop sources of temporary help and contractors to use as needed to fill in
22 during absences.
- 23 7. Create a system to ensure that all contractors or temporary employees are in
24 compliance with applicable CalPERS requirements.
- 25 8. Develop a set of baseline performance measures that include workload,
26 efficiency and effectiveness measures for each program in each department.

27
28
29 Recommendations 1, 6 and 7 provide guidelines on how to manage vacancies. Given
30 the lean staffing levels, attracting and filling positions with qualified staff was a top
31 priority. As of March 1, 2018, eight (8) (or 22.2%) of the Town's 36 FTE positions were
32 vacant including four (4) (or 57%) of the seven (7) management positions. As of
33 April 11, 2018, the four (4) management positions have been filled and progress is
34 being made to fill two (2) additional positions. Stabilizing the work force in order to
35 prioritize and complete projects, process planning entitlements, prepare the FY 2018/19
36 budget, and launch the Town's summer recreational programs has been accomplished.

37
38 Recommendations 2, 3, 5 and 8 provide guidelines on establishing systems to evaluate
39 workload and efficiencies. Additional efficiencies could be achieved by replacing
40 manual systems with modern software which could also improve the Town's ability to
41 collect performance measures and make more information readily available to the
42 public. In the coming months Parks and Recreation will be looking to restructure the
43 CivicRec software system used for scheduling rentals and processing registrations to
44 maximize its capabilities and create customized reporting. The Public Works
45 Department will also be exploring the costs and benefits of implementing a "See, Click,
46 Fix" workorder system to more efficiently process work requests and generate data to
47 evaluate performance measures. An evaluation of the resources needed to build upon
48 the Town's basic geographic informational system (GIS) mapping will also be

1 undertaken in the next year by the Planning and Public Works Departments in order to
2 make parcel data, including zoning, more readily available.

3

4 **Fiscal Impact**

5

6 There is no fiscal impact associated with receipt of this report.

7

8 The cost of the study was \$14,950 and was paid out of the Town Manager's
9 Contingency Fund. This fund has a remaining fund balance of \$17,218.

10

11 **Recommendation**

12

13 Review and accept report on results of the staffing assessment study conducted by
14 Management Partners.

15

16 **Attachment:**

17 A. Town of Moraga Staffing Assessment Report, March 2018 by Management
18 Partners

ATTACHMENT A

Town of Moraga Staffing Assessment Report, March
2018 by Management Partners

Town of Moraga Staffing Assessment Report

March 2018

Management
Partners





March 8, 2018

Mr. James N. Holgersson
Interim Town Manager
Town of Moraga
329 Rheem Blvd.
Moraga, CA 94556

Dear Mr. Holgersson:

Management Partners is pleased to provide this report on our high-level analysis of the Town of Moraga's staffing levels in specific departments. We have compiled the information for peer jurisdictions on existing and publicly available information. The focus of the review was on the public works, planning, parks and recreation, and administrative services functions.

We appreciate the assistance and cooperation of employees in each of the departments that are the focus of this report in providing information for this study. If we can be helpful in the future, please let us know.

Sincerely,

A handwritten signature in black ink, appearing to read 'Gerald E. Newfarmer', written in a cursive style.

Gerald E. Newfarmer
President and CEO

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Executive Summary

Management Partners was retained by the Town of Moraga to review staffing levels in specific departments compared with peers based on existing and publicly available information. The purpose was to determine how the Town compares with peers to inform discussions regarding staffing levels, capacity, and service delivery. The focus of the review was on the Public Works, Planning, Parks and Recreation, and Administrative Services Departments.

The major outcome in this analysis was that although some staff functions are supplemented with contract and/or temporary assistance, which is typical in smaller cities and towns, the large number of observed vacancies has a serious and ongoing impact on service delivery. Specifically, in the four functional areas reviewed, the level of vacancies in authorized positions ranged from 17% to 67%. In three of the four departments vacancies were 33% or higher. The Town relies heavily on temporary or contract assistance, especially for extended leaves of absence by employees.

To fully assess staffing and budget for service levels desired internally and by the community, Town managers need to establish workload and performance measures that can be used over time to determine staffing and resource levels. The organization's reliance on manual systems to record and capture data presents an obstacle to understanding the work that *needs* to be done compared to what *can* be done with existing staffing levels.

Management Partners found important strengths and organizational values that should be recognized and preserved as new people come on board. First and foremost is the quality of existing employees who understand the importance of public service and try to serve the community as best they can with limited resources. We found this value in all levels of the departments with both newly hired and long-term employees.

A list of recommendations is included in Attachment A.

To assist the town in discussing standards this report includes some accepted service level standards for various maintenance activities (see Attachment B and Appendix 1).

Background and Methodology

The initial focus of our review was on the Public Works, Planning, and Parks and Recreation Departments. While the analysis was underway, the Administrative Services Department was added to the departments studied. In addition to analyzing capacity, roles, and responsibilities at a high level, opportunities to increase efficiency and effectiveness also surfaced and are included in the study.

The plan of work involved reviewing current positions and assessing department responsibilities and service demands. Information was obtained from interviewing employees in the four departments, reviewing job descriptions and other data provided by staff, and benchmarking with similar and/or nearby towns and cities. With this information Management Partners examined staffing, workload and service demands, use of technology and existing operations.

To help reduce the costs of this assessment, Management Partners relied initially on comparative data from peer jurisdictions assembled from other projects. Peer agency information typically compares five to seven agencies; however, we have found that smaller agencies organizations are more difficult to compare as they are often organized differently and rely, in varying degrees, on contract services to supplement staffing or to deliver services. The initial group of cities was determined not to be comparable to Moraga, so Management Partners sought information about other cities in the Bay Area that were more comparable. Although not technically peers, Management Partners was asked by the Town manager to include some other nearby cities in the data we collected.

Peer Agency Information

Overview

The Town of Moraga has a population of 17,416 and is located in Contra Costa County. Management Partners selected five cities from the Bay Area that had populations between 12,000 and 26,000; median household incomes between \$100,000 and \$200,000; and did not provide fire services. At the request of the Town, the cities of Danville and Walnut Creek were also included in the data collected but were not included in calculations of peer averages. Table 1 shows the cities used in this report. Information was obtained from city websites and other publicly available sources.

Table 1. List of Cities and Towns for Benchmarking Sorted by Population

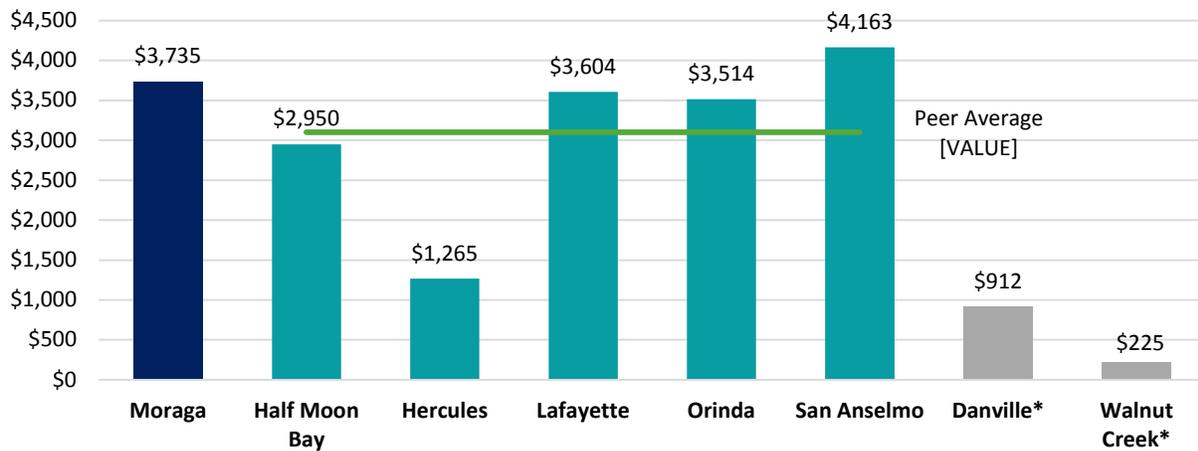
City/Town	County	Population (2016)	Median Household Income (2016)	FY 2017-18 Total Operating Budget	FY 2017-18 Total FTEs
Moraga	Contra Costa	17,416	\$136,336	\$9,764,248	36.5
Lafayette	Contra Costa	26,103	\$142,977	\$24,831,232	39.7
Hercules	Contra Costa	25,360	\$103,044	\$24,965,667	81.5
Orinda	Contra Costa	19,470	\$178,704	\$22,295,463	50.9
Half Moon Bay	San Mateo	12,697	\$106,211	\$22,446,632	36.0
San Anselmo	Marin	12,599	\$107,818	\$21,495,711	25.9
Peer Average		19,247	\$127,751	\$23,206,941	46.8
Additional Cities					
Walnut Creek	Contra Costa	69,122	\$82,848	\$85,761,606	369.0
Danville	Contra Costa	44,631	\$146,603	\$32,893,454	160.8

Sources: Population data as estimated by the Census Bureau; median household income data from American Community Survey five-year estimates (2012 to 2016); budget and staffing information from FY 2017-18 adopted budgets

Moraga has the third highest median household income (\$136,336) of the cities being compared, but has less than 50% of the total operating budget of the peer agencies.

Figure 1 indicates that Moraga is similar to Lafayette and Orinda in terms of median household income per FTE.

Figure 1. Median Household Income per Total FTE in FY 2017-18

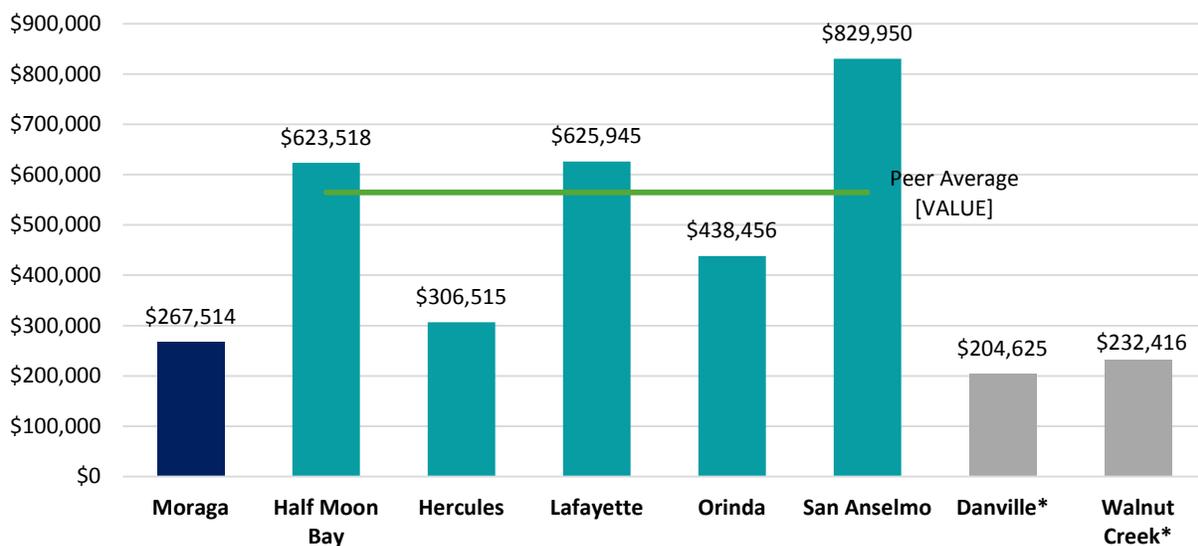


Sources: Median household income data from American Community Survey five-year estimates (2012 to 2016); budget and staffing information from FY 2017-18 adopted budgets.

*Additional cities considered

Figure 2 shows the operating budget per total FTE among the peer agencies.

Figure 2. Operating Budget per FTE in FY 2017-18



Sources: Budget and staffing information from FY 2017-18 adopted budgets

*Additional cities considered

While Moraga has the second highest ratio of median household income per FTE, it has the lowest ratio of operating budget per FTE among the

peers. These ratios along with an operating budget at less than 50% of its peers means that Moraga is operating with a smaller staff, and as a result is likely providing fewer services than the peers.

Although the share of property tax is only one indicator of financial sustainability, Table 2 shows that Moraga receives the lowest percentage of property tax within its municipal boundaries in Contra Costa County.

Table 2. Share of Property Tax for Select Contra Costa County Cities

City/Town	Share of Property Tax
Richmond	28.51%
El Cerrito	22.23%
Pinole	18.84%
Martinez	15.92%
Walnut Creek	9.41%
Danville	7.63%
Orinda	7.39%
Lafayette	6.66%
Clayton	6.63%
Hercules	5.42%
Moraga	5.32%

Source: Town of Moraga 2017-18 Budget – Source: HdL Coren & Cone

This report has a focused analysis on a subset of total FTEs across four departments. Table 3 provides FTEs in the following departments: Administrative Services; Community Development/Planning; Public Works; Parks Maintenance; and Recreation.

Table 3. Full-Time Equivalent Employees (FTEs) in Comparable Functions

City/Town	Total FTEs	Administrative Services ¹	Community Development/ Planning	Public Works	Park Maintenance ²	Recreation
Moraga	36.5	3.0	5.0	5.9	3.1	3.0
Hercules	81.5	6.0	1.6	11.6	0.0	31.0
Half Moon Bay	36.0	7.0	7.0	12.0	2.0	2.0
Lafayette	39.7	4.9	9.0	13.0	2.9	2.8
Orinda	50.9	5.1	5.8	11.0	5.0	5.0
San Anselmo	25.9	3.0	2.0	7.3	6.0	1.8
Peer Average	46.8	5.2	5.1	11.0	4.0	8.5
Additional Cities						
Danville	160.8	12.3	27.0	22.0	9.0	38.8
Walnut Creek	369.0	29.0	37.0	70.0	37.0	53.0

Sources: Staffing information from FY 2017-18 adopted budgets

¹Administrative Services includes: finance and accounting, personnel, risk management, budgeting, employee relations, purchasing, and Information Technology (IT).

²Park Maintenance is identified separately since it is budgeted in Public Works, Parks and Recreation or both in the peers so that comparisons may be made.

In the functions analyzed, Moraga has about half the administrative services staff as the peer average; about half the public works staff as the peer average; but close to the average number of FTEs for community development/planning and park maintenance. Except for Hercules, Moraga’s recreation staffing is about the same as the other peer cities. The impacts of these staffing levels are discussed below by department.

Department Information

This section provides further information about the departments Management Partners was asked to address in this data review.

Table 4 shows the Town of Moraga’s FTEs by department and by position. The number of vacancies is also listed.

Table 4. Moraga Budgeted and Vacant FTEs by Department

Departments/Positions	FTEs	Vacancies
Administrative Services		
Administrative Services Director	1.00	1.00
Accountant	1.00	
Administrative Services Technician	1.00	1.00
Totals	3.00	2.00
Planning		
Planning Director	1.00	1.00
Senior Planner	1.00	
Associate Planner	2.00	1.00
Senior Administrative Assistant	1.00	
Totals	5.00	2.00
Public Works/Engineering		
Public Works Director/Town Engineer	1.00	
Senior Civil Engineer	1.00	
Assistant Engineer	1.00	1.00
Administrative Assistant	1.00	
Public Works/Parks Manager	1.00	
Senior Maintenance Worker	1.00	
Totals	6.00	1.00
Parks and Recreation		
Parks and Recreation Director	1.00	1.00
Lead Maintenance Worker	1.00	
Maintenance Worker	2.00	1.00
Recreation Coordinator II	1.00	
Recreation Coordinator I	1.00	
Totals	6.00	2.00

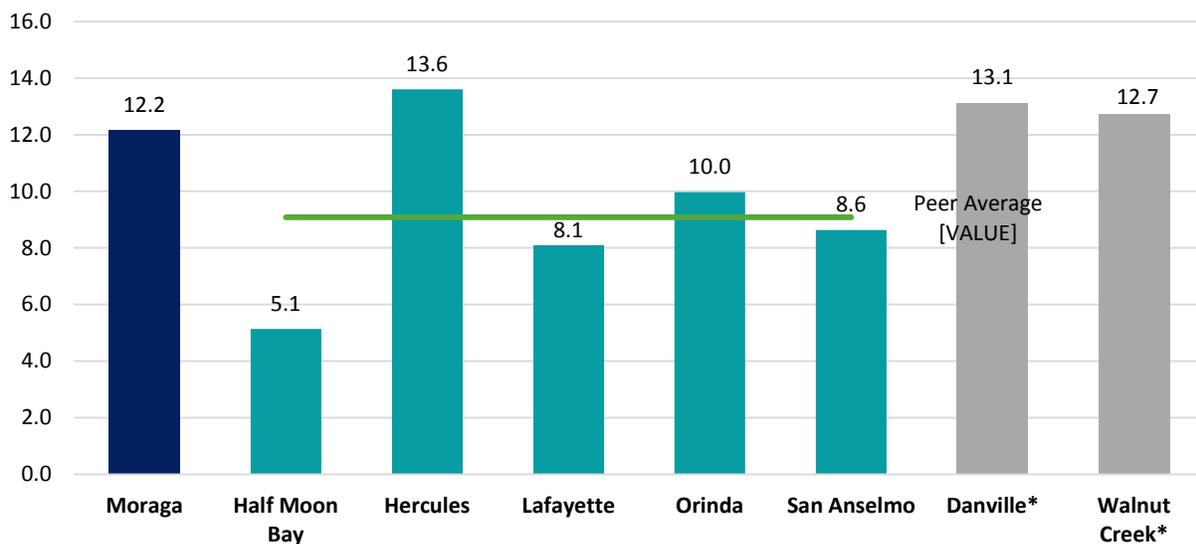
Sources: Information from FY 2017-18 adopted budgets and staff interviews.

Administrative Services Department

Staff in the Administrative Services Department includes an administrative services director, accountant, and administrative services technician. The director and technician positions are currently vacant and have not been filled on a temporary basis. Administrative services functions include finance and accounting, personnel, risk management, budgeting, employee relations, purchasing, and information technology (IT). IT is performed through a contract for services and staff in the Administrative Services Department is responsible for the other functions.

Figure 3 compares the total FTEs in the organization per Administrative Services staff person.

Figure 3. Total FTEs per Administrative Services FTE



Sources: Staffing information from FY 2017-18 adopted budgets

*Additional cities considered

Moraga's ratio is the second highest compared to the peer agencies. The more significant problem for Moraga is that two of three positions in the Administrative Services Department are vacant. This is important to note, especially considering the number of vacancies in the Town and that this department is responsible for conducting recruitments.

The vacancy means that other departments are having to conduct their own recruitments while also filling in for the vacant positions in their own departments. The two vacancies also mean that the accountant must perform the accounts payable, accounts receivable, and purchasing functions. This is too great a workload for one person and could lead to delays in processing receivables, payables, and purchasing. The situation

also creates internal control risks. Three FTEs in the Administrative Services Department appears to be sufficient as long as the positions are filled. Vacancies create significant impacts even if filled by temporary or contract assistance.

Planning Department

The Planning Department consists of the following positions: a planning director, senior planner, two associate planners, and a senior administrative assistant. The senior planner is currently acting as the director, leaving the senior planner vacant. One of the associate planner positions is vacant. Work is also supplemented by contract. Staff perform the planning permit function and contract with Contra Costa County for the building permit and inspection process.

As with other functions for smaller organizations, planning and building activities are typically split between in-house staff or contractors or both. Table 5 compares who performs the functions in the benchmark cities and towns.

Table 5. Comparing Planning/Building Services Performed In-house, Contracted, or Both

City	Plan Check Services	Inspection Services	Code Enforcement	Planning	Counter Services
Moraga	Both	Both	In-house	Both	Both
Half Moon Bay	Both	Contract	Contract	Both	In-house
Hercules	Contract	Contract	In-house	In-house	In-house
Lafayette	Contract	Contract	In-house	In-house	In-house
Orinda	In-house	Both	In-house	In-house	In-house
San Anselmo	Both	In-house	In-house	In-house	In-house
Additional Cities					
Danville	Both	In-house	In-house	In-house	In-house
Walnut Creek	Both	Both	In-house	In-house	Both

Sources: City department staff via phone interviews

The use of contract services allows for variations in demands for service during the year to be handled by contractors while maintaining a basic staffing level. The problem for Moraga is that with a staff of four planners, vacancies severely impact the department. Currently with two vacancies, the department is at half of its regular staffing. This could be acceptable during times when workload is low, but it is not sustainable over long periods. Recruiting for a director position usually takes longer than for other positions and recruitments for other vacancies in the

department have been postponed until the new director can be involved in the selection process. Temporary help could be needed to bridge the gap.

Recommendation 1. Fill vacancies with temporary staff or contractors until permanent staff is hired.

Public Works Department

The Moraga Public Works Department has six positions including a public works/parks manager that oversees the work of a senior maintenance worker in public works and three maintenance worker positions in the Parks and Recreation Department. One of the maintenance worker positions is currently vacant. This vacant position typically spends 80% of his time on park related maintenance and 20% time on street maintenance.

The department also has two engineers whose work is supplemented with contracted services, depending on the size of the project. Table 6 lists the major public services and whether they provided in-house, by contract, or a combination of both.

Table 6. Comparing Public Works Services Performed In-house, Contracted, or Both

City	Facilities	Custodial	Fleet	Street	Parks
Moraga	In-house	Contract	Contract	Both	In-house
Half Moon Bay	Both	Contract	Contract	Contract	Contract
Hercules	In-house	Both	Contract	Both	Both
Lafayette	Contract	Contract	Contract	Contract	In-house
Orinda	In-house	Contract	Both	In-house	In-house
San Anselmo	Both	Contract	Contract	In-house	Contract
Additional Cities Considered					
Danville	In-house	Contract	Contract	In-house	In-house
Walnut Creek	In-house	Contract	In-house	In-house	In-house

Sources: City department staff via phone interviews

Without further research about programs and services provided by each agency (which was beyond the scope of this analysis), it was not possible to analyze information regarding specific staffing levels.

Park and Facility Maintenance

Currently, the public works/parks manager oversees both public works and parks maintenance staff (a manager and a maintenance worker in public works and three maintenance workers in parks and recreation).

The maintenance function is operated as a single unit providing street, facility, and park maintenance.

This may be an effective arrangement; however, the parks and recreation director position has been vacant and is temporarily filled with interim part-time contractors. A new director will be arriving soon. Effective communication will be required, as well as consensus about maintenance goals and priorities for this arrangement to work well.

Often, maintenance functions are located wholly in one department. In larger organizations the functions can be split between street, facility, and park maintenance with the facility and park maintenance functions being in either the Public Works or the Parks and Recreation Department. However, in smaller organizations, maintenance workers split the time they spend on these functions. This is something to monitor over time to ensure the current arrangement continues to function efficiently and there are no conflicts in setting priorities and work assignments.

The day-to-day work of the maintenance crew includes park maintenance, facility maintenance, and street maintenance. Maintenance staff performs minor repairs and contracts for larger or more complex maintenance needs. Custodial services are provided through a contract. The maintenance staff does facility rental set-ups and tear-downs.

The department uses a work order system that includes emails, but mostly relies on maintenance needs being identified by Town staff. There is no formal performance measurement system and workload summary data are not reported from the work orders. Thus, there is no relationship between the level of work being done and level of service the community wants or expects.

Park maintenance is difficult to benchmark since the maintenance requirements depend on the size of the parks and the features in them. For example, mowing with a hand mower take four times longer than mowing with a gang-mower (which has four times the cutting swath). Many small parks are more labor-intensive than one large park of equal size. Thus, the best measure of workload and staffing needs is to evaluate the appearances of the parks and facilities.

The Association of Physical Plant Administrators (APPA) has created criteria for evaluating service levels for custodial, grounds/landscaping, and building maintenance. These can be used to evaluate the services provided and to assist in the budget process by equating service level costs to the level of service the Town Council wants to achieve. The levels are described in Appendix 1.

The results of the service levels being provided are measured by annually inspecting the facilities, using check-sheets and descriptions of the service levels. Inspections can be made by staff, paid part-timers, or volunteers (e.g., a Friends of Parks and Recreation group). The inspections can be annual or every two or three years.

Recommendation 2. Create a maintenance service baseline for custodial, park landscaping, and facility maintenance. This should include periodic evaluations of parks and facilities.

The maintenance service baseline is then used in the budget process to equate staffing levels with service levels. For example, if the building maintenance service level is currently at Level 3 “Managed Care” and the community would like Level 2 “Comprehensive Stewardship,” (described in Appendix 1) the costs and staffing levels required can be considered against other priorities during the budget process.

The maintenance function can be categorized into four basic types of maintenance activities (described in Attachment B) and are summarized below.

1. *Preventive.* Preventive maintenance is a program in which wear-and-tear is anticipated and regular corrective actions are taken to maximize efficiency and minimize deterioration, e.g., replacing HVAC belts on a fixed schedule.
2. *Proactive.* Proactive maintenance is regularly planned and scheduled maintenance, such as custodial services or mowing.
3. *Reactive.* Reactive maintenance is making repairs and responding to malfunctions and emergencies, such as leaking faucets.
4. *Discretionary.* Discretionary maintenance includes modifications, rearrangements, and new construction.

These four activity types should be done in the listed priority. It is common to allow discretionary work to take precedence over the higher priority work; however, Moraga staff reports this does not occur. A comprehensive Computerized Maintenance Management System (CMMS) would organize, track, prioritize, and schedule maintenance activities.

While a comprehensive system like this is often associated with larger maintenance operations, it would be beneficial to evaluate the costs and benefits of acquiring such a system or certain modules as it is the most effective way to assess and measure what needs to get done. Regardless, the City should institutionalize categorizing work into one of the four categories to assist in prioritizing the work.

Recommendation 3. Develop a system to categorize and prioritize all maintenance work as either preventive, proactive, reactive, or discretionary.

To determine future workload, an evaluation needs to be made of all facilities and parks. This would include current condition and estimates of when major work would be needed, such as roof replacements or painting. This will help plan for future work and budget needs as well as identify a backlog of maintenance work.

Recommendation 4. Inspect all facilities to identify current maintenance needs and schedule major work needed in the future. Create a list and schedule of future major maintenance needs and a current backlog of maintenance needed.

Two issues identified in the staff interviews were a lack of storage areas for files and office space for the Parks and Recreation Department’s recreation staff. These can be added to the facility needs list. Costs can be estimated and prioritized in the next budget cycle.

Street Maintenance

Street maintenance levels are measured using a Pavement Condition Index (PCI). For the San Francisco Bay Area cities, the PCIs are reported by the Metropolitan Transportation Commission. Table 7 describes the Pavement Condition Index levels.

Table 7. Description of Pavement Condition Index

Pavement Condition Index Level	Description of Associated Pavement Condition
Very Good-Excellent (PCI = 80-100)	Newly constructed for resurfaced pavement with few signs of distress.
Good (PCI = 70-79)	Pavement requiring mostly preventive maintenance and showing only low levels of distress.
Fair (PCI = 60-69)	Pavement at the low end of this range is significantly distressed and may require a combination of rehabilitation and preventive maintenance.
At Risk (PCI = 50-59)	Deteriorated pavement requiring immediate attention, including rehabilitative work.
Poor (PCI = 25-49)	Pavement showing extensive distress and requiring major rehabilitation or reconstruction.
Failed (PCI = 0-24)	Extremely rough pavement that needs complete reconstruction.

Sources: As described by the Metropolitan Transportation Commission ([link](#))

Maintaining streets at a fair or above level reduces maintenance and replacement costs over the long term. Maintaining streets is much less expensive than replacing them. Table 8 compares the PCI ratings of the peer agency cities.

Table 8. Pavement Condition Index* Comparison in 2016

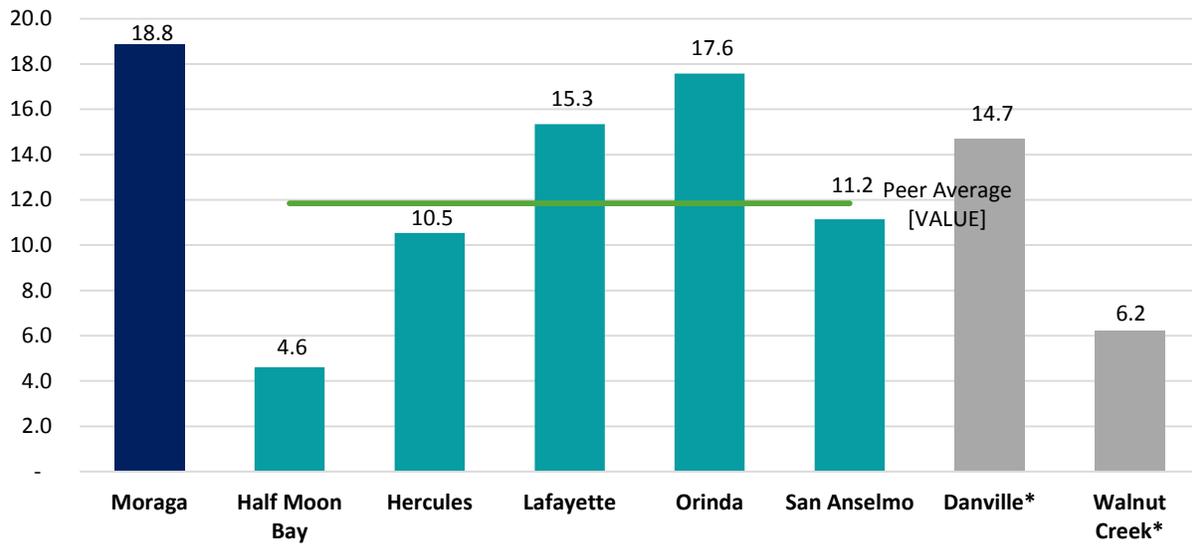
City/Town	Lane Miles	Pavement Condition Index (PCI)	Rating
Lafayette	199.4	79	Good
Hercules	122.3	71	
Moraga	110.4	67	Fair
<i>Peer Average</i>	130.4	66	
Half Moon Bay	55.4	66	
San Anselmo	81.4	62	
Orinda	193.3	54	At Risk
Additional Cities Considered			
Danville	323.4	75	Good
Walnut Creek	435.0	72	

*Sources: Lane miles and PCI data from Pavement Condition of Bay Area Jurisdictions 2016 report by the Metropolitan Transportation Commission

The Town improved slightly over 2016 to its current PCI of 68. The PCI is a good measure of performance of public works engineering and street maintenance staff with the resources available. It can be used in the budget process to inform the Town Council and residents of the current condition of the streets and provide the basis for funding decisions to improve the streets and, consequently, the PCI.

Figure 4 compares the street lane-miles per public works employee. (All classifications of public works employees in Moraga were included as the portions of work devoted only to streets could not be determined.) At 18.8 lane-miles per FTE, Moraga’s percentage of street lane miles per employee is 60% higher than the average of 11.8. This is an indication of the high workload currently sustained to maintain, repair, and replace street pavement. When tied to the PCI rating and the use of contractors, this can be helpful during the budget process to determine whether additional staff is needed.

Figure 4. Street Lane-Miles per Public Works Employee



Sources: Staffing information from FY 2017-18 adopted budgets; street lane information from Pavement Condition of Bay Area Jurisdictions 2016 report by the Metropolitan Transportation Commission

*Additional cities considered

The recent sinkhole is an example of a situation where contract or temporary help was required. Long-term requirements of problems like this could take maintenance staff away from routine maintenance work and lead to maintenance backlogs.

Engineering

Engineering staff consists of the public works director/town engineer, a senior engineer, and an assistant engineer. All positions are filled, and their work is supplemented by contractors, as needed. Work is assigned to staff or contractors according to the size of the project and the current workload. Large projects consume too much of a staff person's time, leaving many of the smaller projects to be done when time permits.

A major storm drain project is on the horizon and Town leaders plan on hiring additional resources to oversee the project. With such intensive work being planned, hiring temporary staff for the term of the project is a best practice.

Parks and Recreation Department

The Parks and Recreation Department includes the following positions: parks and recreation director, recreation coordinator II, recreation coordinator I, lead maintenance worker, and two maintenance workers. The director position is currently vacant. Although the park maintenance staff is budgeted in the Parks and Recreation Department, the work is

currently managed in the Public Works Department by the public works/park manager. Since it is difficult to make benchmark comparisons with the variety of organizational assignments of these activities, the parks maintenance function was included in the analysis above of the Public Works Department.

Historically, recreation programming was done almost entirely with in-house staff. This has evolved over time so that most of the programs are now provided by contractors or community groups. Contractors are now used for the arts and crafts programs, dance programs, and others. In-house staff obtains contractors, schedules classes, and creates an activity guide for the public. Classes that do not fill up are not offered again, thus responding to demand. Sports programs are now run by groups such as Little League.

Recreation programming is not strictly or even primarily a public sector service like building, planning or public works. The Town residents can take classes anywhere or go to commercial facilities (gyms). Recreation staff is now more focused on coordinating or conducting special events. The demand for recreation programs and special events determines the size of the staff needed. Filling the director position will allow an evaluation of the various programs and special events to determine which can be eliminated and where programming needs to be expanded.

Other Observations

During interviews, several issues surfaced that we believe impact the overall efficiency and effectiveness of the departments reviewed. Each is discussed briefly below.

Technology

Several departments reported using manual systems to record various activities. In some cases, the same data needed to be entered more than once. As mentioned previously, computerized systems exist that can track and report on activities (e.g., computerized maintenance management systems). Departments are maintaining records on separate MS Excel spreadsheets or paper forms. Town managers should place a priority on reviewing the current manual systems to identify options to simplify and streamline the work. This could even include purchasing off-the-shelf systems (e.g., generic systems like MS Project) or having systems developed using common software (e.g., MS Access or MS Excel).

Recommendation 5. Develop a strategic plan to transition manual recordkeeping to modern business systems.

Vacancies

The problem with vacancies was discussed previously in this report. As noted, it is a serious and significant problem in all departments. Management Partners well understands that small local government organizations are seriously challenged by routine absences (vacations and sick leave), and even more so by vacant positions that may require a number of months to re-fill. This situation is complicated by the need to comply with CalPERS requirements particularly when employing retired annuitants from the CalPERS system. Strategies need to be developed to have sources of temporary staff or contractors to fill in when needed.

Recommendation 6. Develop sources of temporary help and contractors to use as needed to fill in during absences.

Recommendation 7. Create a system to ensure that all contractors or temporary employees are in compliance with applicable CalPERS requirements.

Performance Measures

There is no formal tracking of workload and performance. Without performance or workload measures, municipalities are severely challenged to explain service levels to the community and why they can't be improved without additional resources and/or additional staff. Clearly resources and finances are lean, but such data can help inform policymakers about the impact of resource allocation decisions.

Recommendation 8. Develop a set of baseline performance measures that include workload, efficiency and effectiveness measures for each program in each department. These will be especially useful during the budget process.

Teamwork and Values

In all interviews, teamwork was mentioned as a positive factor. People noted how staff works together to help each other. There was concern mentioned about the number of vacancies and that getting many new people may mean that the teamwork and camaraderie could be lost. However, since it is ingrained in the organizational culture, it is likely to continue. There is also a strong sense of community service across all departments. These are commendable and should be nurtured.

Conclusion

One of the major issues faced by Town of Moraga leaders in the departments reviewed by Management Partners is the number of vacancies. Temporary or contract assistance is needed to bridge the gap. However, consideration needs to be given regarding regulatory requirements (e.g., related to CalPERS) when using temporary and contract personnel on an ongoing basis. Employing technological help and improving business systems could also provide assistance in specific areas and reduce the impact of vacancies, but this is a long-term strategy.

While the Town of Moraga faces many challenges, Management Partners found important strengths and organizational values that should be recognized and preserved as new people join the workforce. First and foremost is the quality of existing employees who understand the importance of public service and try to serve the community as best they can with limited resources. We found this value in all levels of the departments with both newly hired and long-term employees.

Attachment A – List of Recommendations

Recommendation 1. Fill vacancies with temporary staff or contractors until permanent staff is hired.

Recommendation 2. Create a maintenance service baseline for custodial, park landscaping, and facility maintenance.

Recommendation 3. Develop a system to categorize and prioritize all maintenance work as either preventive, proactive, reactive, or discretionary.

Recommendation 4. Inspect all facilities to identify current maintenance needs and schedule major work needed in the future.

Recommendation 5. Develop a strategic plan to transition manual recordkeeping to modern business systems.

Recommendation 6. Develop sources of temporary help and contractors to use as needed to fill in during absences.

Recommendation 7. Create a system to ensure that all contractors or temporary employees are in compliance with applicable CalPERS requirements.

Recommendation 8. Develop a set of baseline performance measures that include workload, efficiency and effectiveness measures for each program in each department.

Attachment B – Definition of Maintenance Functions

Management of workload is important to the smooth operation of the maintenance department. The types of maintenance functions are defined below. It is important for cities to prioritize work according to these definitions and to inform other city departments and the Council of the need to prioritize accordingly. Discretionary work should only be done if the other types are being completed in a timely manner.

Maintenance Functions Defined

There are four basic types of maintenance activities:

1. Preventive
2. Proactive
3. Reactive
4. Discretionary

Preventive Maintenance

Preventive maintenance is a program in which wear and tear is anticipated and regular corrective actions are taken to maximize efficiency and minimize deterioration. Preventive maintenance involves a planned program of inspection, adjustment, lubrication, and replacement of components, including performance testing and analysis. A successful preventive maintenance program extends the life of facilities and equipment, minimizes unscheduled downtime, and avoids more costly system failures.

Equipment preventative maintenance schedules are typically prescribed for each particular unit, e.g., manufacturer’s recommendations on frequencies of lubrication, changing filters, or running tests. Warranties may require that the recommended preventive maintenance actions are taken and properly documented or else the warranty may be voided.

When preventive maintenance is not required by a warranty’s schedule, its schedule is determined by analyzing the “mean-time-to-failure,” which is the average length of time the part (e.g., an HVAC fan belt) will last before it fails. Maximizing the preventive maintenance schedule for this part is then determined by how often it is acceptable to have the part fail (if at all) before replacing it, including the failure’s effect on other components and the acceptability of the downtime. Thus, inspecting an HVAC fan belt is more critical than inspecting faucets for leaks.

Proactive Maintenance

Proactive maintenance is regularly planned and scheduled maintenance, such as custodial services. It also includes planned light bulb replacements on a schedule (as opposed to waiting for them to burn out) and painting on established schedules.

Reactive Maintenance

Reactive maintenance is making repairs and responding to malfunctions and emergencies, such as leaking faucets, broken windows, and replacing burned out light bulbs.

Discretionary Maintenance

Discretionary maintenance includes modifications, rearrangements, and new construction. This includes work such as rearranging office furniture, customer-requested painting to change color schemes, moving file cabinets, hanging pictures, and constructing a new storage shed. One way to control discretionary maintenance is to require departments to pay (overtime rate) from their budgets or have the City Council identify and approve the funding source. Discretionary maintenance is only done after the other maintenance types have been done.

Most of the work falls into the reactive and proactive categories, e.g., work requests are reactive and mowing schedules are proactive. Proactive and preventive maintenance are scheduled. Discretionary work can receive a higher priority than necessary and can distract staff from accomplishing other higher priorities of work.

Appendix 1 – Detailed Listing of Association of Physical Plant Administrators (APPA) Service Levels¹

Custodial Service Levels

Level 1: Orderly Spotlessness

- Floors and base moldings shine and/or are bright and clean; colors are fresh. There is no build-up in corners or along walls.
- All vertical and horizontal surfaces have a freshly cleaned or polished appearance and have no accumulation of dust, dirt, marks, streaks, smudges, or fingerprints. Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean and odor-free.

Level 2: Ordinary Tidiness

- Floors and base moldings shine and/or are bright and clean. There is no build-up in corners or along walls, but there can be up to two days' worth of dust, dirt, stains, or streaks.
- All vertical and horizontal surfaces are clean, but marks, dust, smudges, and fingerprints are noticeable upon close observation. Lights all work and fixtures are clean.
- Washroom and shower fixtures and tile gleam and are odor-free. Supplies are adequate.
- Trash containers and pencil sharpeners hold only daily waste, are clean and odor-free.

Level 3: Casual Inattention

- Floors are swept or vacuumed clean, but upon close observation there can be stains. A build-up of dirt and/or floor finish in corners and along walls can be seen.
- There are dull spots and/or matted carpet in walking lanes. There are streaks or splashes on base molding.
- All vertical and horizontal surfaces have obvious dust, dirt, marks, smudges, and fingerprints. Lamps all work and fixtures are clean.
- Trash containers and pencil sharpeners hold only daily waste, are clean and odor-free.

¹ The organization was named the Association of Physical Plant Administrators in the late 1960's through the early 1990's. Today, the association is known as "APPA: Leadership in Educational Facilities" and is referred to as "APPA."

Level 4: Moderate Dinginess

- Floors are swept or vacuumed clean, but are dull, dingy, and stained. There is a noticeable build-up of dirt and/or floor finish in corners and along walls.
- There is a dull path and/or obviously matted carpet in the walking lanes. Base molding is dull and dingy with streaks or splashes.
- All vertical and horizontal surfaces have conspicuous dust, dirt, smudges, fingerprints, and marks. Lamp fixtures are dirty and some lamps (up to 5 percent) are burned out.
- Trash containers and pencil sharpeners have old trash and shavings. They are stained and marked. Trash containers smell sour.

Level 5: Unkempt Neglect

- Floors and carpets are dull, dirty, dingy, scuffed, and/or matted. There is a conspicuous build-up of old dirt and/or floor finish in corners and along walls. Base molding is dirty, stained, and streaked. Gum, stains, dirt, dust balls, and trash are broadcast.
- All vertical and horizontal surfaces have major accumulations of dust, dirt, smudges, and fingerprints, all of which will be difficult to remove. Lack of attention is obvious.
- Light fixtures are dirty with dust balls and flies. Many lamps (more than 5 percent) are burned out.
- Trash containers and pencil sharpeners overflow. They are stained and marked. Trash containers smell sour.

Grounds/Landscaping Maintenance Service Levels (Turf examples)

Level 1: State-of-the-Art Maintenance

- Grass height maintained according to species and variety of grasses. Mowed at least once every five days.
- Aeration as required but not less than four times per year.
- Reseeding or re-sodding as needed.
- Weed control to be practiced so that no more than 1 percent of the surface has weeds present.

Level 2: High-Level Maintenance

- Grass cut once every five working days.
- Aeration as required but not less than two times per year.
- Reseeding or re-sodding when bare spots are present.
- Weed control practiced when weeds present a visible problem or when weeds represent 5 percent of the turf surface. Some pre-emergent products may be used at this level.

Level 3: Moderate-Level Maintenance

- Grass cut once every ten working days.
- Normally not aerated unless turf quality indicates a need or in anticipation of an application of fertilizers.
- Reseeding or re-sodding done only when major bare spots appear.
- Weed control measures normally used when 50 percent of small areas are weed infested or when 15 percent of the general turf is infested with weeds.

Level 4: Moderately Low-Level Maintenance

- Low frequency mowing scheduled based on species. Low growing grasses may not be mowed. High grasses may receive periodic mowing.
- Weed control limited to legal requirements for noxious weeds.

Level 5: Minimum-Level Maintenance

- Low frequency mowing scheduled based on species. Low growing grasses may not be mowed. High grasses may receive periodic mowing.
- Weed control limited to legal requirements for noxious weeds.

Building Maintenance Service Levels

Level 1: Showpiece Facility

- Maintenance activities appear highly focused.
- Typically, equipment and building components are fully functional and in excellent operating condition.
- Service and maintenance calls are responded to immediately.
- Buildings and equipment are regularly upgraded, keeping them current with modern standards and usage.

Level 2: Comprehensive Stewardship

- Maintenance activities appear organized with direction.
- Equipment and building components are usually functional and in operating condition.
- Service and maintenance calls are responded to in a timely manner.
- Buildings and equipment are regularly upgraded, keeping them current with modern standards and usage.

Level 3: Managed Care

- Maintenance activities appear to be somewhat organized, but they remain people-dependent.
- Equipment and building components are mostly functional, but they suffer occasional breakdowns.
- Service and maintenance call response times are variable and sporadic without apparent cause.
- Buildings and equipment are periodically upgraded to current standards and usage, but not enough to control the effects of normal usage and deterioration.

Level 4: Reactive Management

- Maintenance activities appear to be somewhat chaotic and are people-dependent.
- Equipment and building components are frequently broken and inoperative.
- Service and maintenance calls are typically not responded to in a timely manner.
- Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present usage needs.

Level 5: Crisis Response

- Maintenance activities appear chaotic and without direction.
- Equipment and building components are routinely broken and inoperative.
- Service and maintenance calls are never responded to in a timely manner.
- Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present usage needs.